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Foreign CROPS AND MARKETS



VOLUME 59

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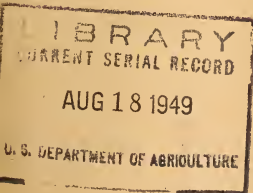
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FOR RELEASE

MONDAY

AUGUST 15, 1949



UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON 25, D.C.

L A T E N E W S

Gr Great Britain is again becoming seriously menaced by fowl pest, a poultry disease introduced into the country 2 1/2 years ago. The outbreak prompted a new order from the Ministry of Agriculture which limits the movement of poultry in an attempt to prevent spreading the disease.

Ministry of Food and Ministry of Agriculture are investigating the possibilities of reducing the risk of fowl pest infection from eviscerated carcasses imported from infected European countries. However, there is no evidence that importation of only eviscerated poultry carcasses from European countries since 1947 has been an ineffective precaution.

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The 1949 cotton crop in Greece is estimated at 64,000 bales (of 500 pounds gross) compared with 55,000 in 1948. The 1949 acreage was previously reported at 136,000 acres against 112,000 in 1948.

FOREIGN CROPS AND MARKETS

Published weekly to inform producers, processors, distributors and consumers of farm products of current developments abroad in the crop and livestock industries, foreign trends in prices and consumption of farm products, and world agricultural trade. Circulation of this periodical is free to those needing the information it contains in farming, business, and professional operations. Issued by the Office of Foreign Agricultural Relations of the U.S. Department of Agriculture, Washington 24, D.C.

PRODUCTION OF PLUMS AND PRUNES FOR 1949 11 PERCENT HIGHER

The indicated world production of plums and prunes for all purposes for 1949 is estimated to be 2.7 million short tons, 11 percent higher than the 2.4 produced during the preceding year and 5 percent below the prewar average of 2.8 million. Production in the North American area, estimated at 709,400 tons, compares with 635,875 for 1948 and 808,731 for the prewar average (1935-39). Of the total of 709,400 tons for 1949, the United States has an indicated production of 685,800, consisting of 96,400 tons of plums, and 589,400 prunes.

Plums in the United States are grown in 2 States, namely Michigan and California, with production in 1949 estimated at 5,400 tons and 91,000 respectively. This is about a third higher than the 1948 crop when Michigan produced 3,500 tons and California, 67,000. Production of prunes for all purposes in Idaho, Washington and Oregon, estimated at 156,900 tons, is about three-fourths above last year's crop and one-fifth above average. California's 1949 prune crop is estimated at 432,500 tons fresh basis (173,000 dry basis). This crop is 5 percent below the 1948 crop of 455,000, fresh basis.

Canada's crop of 18,600 tons of plums and prunes is 11 percent above last year's crop of 16,775, and almost three times larger than the prewar average of 6,600. In Mexico, the crop of 5,000 tons, has remained rather constant for the past 5 years.

In most European countries prospects are for a larger crop of plums and prunes in 1949. The indicated crop of 1.8 million tons is 11 percent higher than the 1948 crop of 1.6 million, and is almost equal the large crop of 1.9 million in 1946 and to the prewar average. Indications are that Czechoslovakia, Germany, Rumania, United Kingdom and Yugoslavia will produce 63 percent, or 1.1 million of the 1949 crop; this compares with 59 percent for 1948 and 74 percent prewar.

Yugoslavia, the largest producer, may have a crop of 300,000 tons, as compared with 271,216 tons in 1948, but this still would be only about half as large as the prewar crop. Germany and Rumania, with favorable growing conditions, have crops of plums and prunes indicated at 220,000 and 230,000 tons respectively, which compares with 194,981 and 115,742 tons respectively for 1948. The United Kingdom expects to have a crop of 175,000 tons, a little better than last year's crop and nearly double the prewar average of 95,166 tons. The plum and prune crop in France, estimated at 118,277 tons, is 32 percent below the 1948 crop of 173,134, but 118 percent above the prewar average of 54,222. Hungary, with a bumper crop of 39,683 tons is 89 percent above the crop for the previous year and 8 percent above the prewar average of 36,581.

Production in the Asiatic area is indicated at 114,200 tons, a little less than the 1948 crop of 115,765, but about 4,000 tons more than were produced during 1935-39. Indications are for increased production in South America, Africa and Oceania with 45,000, 16,500 and 21,000 tons respectively. This compares with 41,500, 11,500 and 17,793 in those areas for the previous crop.

PLUMS AND PRUNES: Production in specified countries,
averages 1935-39 and 1940-44, annual 1945-49

Continent and country	Average		1945	1946	1947	1948	1949 ^{1/}
	1935-39	1940-44					
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
NORTH AMERICA							
Canada.....	6,600:	10,320:	12,150:	20,275:	19,475:	16,775:	18,600
Mexico ^{2/}	2,751:	3,556:	5,162:	5,512:	5,500:	5,000:	5,000
United States.....	799,380:	640,380:	783,900:	793,600:	672,500:	614,100:	685,800
Plums.....	66,960:	80,420:	72,600:	106,000:	78,000:	70,500:	96,400
Prunes ^{3/}	732,420:	559,960:	711,300:	687,600:	594,500:	543,600:	589,400:
Total.....	808,731:	654,256:	801,212:	819,387:	697,475:	635,875:	709,400
EUROPE							
Austria.....	61,977:	31,369:	30,000:	51,438:	35,000:	50,000:	55,000
Belgium.....	13,982:	10,980:	20,857:	19,676:	27,558:	27,558:	27,558
Bulgaria.....	79,646:	147,241:	184,745:	115,000:	130,000:	120,000:	150,000
Czechoslovakia.....	185,393:	59,648:	36,419:	198,468:	162,866:	199,436:	200,000
France.....	54,222:	37,846:	66,673:	113,623:	144,401:	173,131:	118,277
Germany.....	415,208:	320,141:	238,220:	407,356:	129,822:	194,981:	220,000
Greece.....	2,657:	3,271:	3,712:	2,943:	3,395:	4,630:	4,000
Hungary.....	36,581:	18,837:	18,188:	30,093:	21,715:	20,944:	39,683
Italy.....	56,728:	69,842:	79,220:	62,811:	72,451:	68,165:	78,374
Luxemburg.....	3,381:	6,672:	12,501:	21,252:	24,227:	17,928:	20,000
Netherlands.....	8,513:	18,606:	18,834:	21,281:	20,849:	33,069:	35,000
Norway.....	9,785:	7,865:	7,302:	12,840:	10,220:	12,975:	10,000
Poland.....	96,161:	73,832:	54,923:	93,918:	30,054:	45,081:	50,000
Rumania.....	87,743:	248,751:	352,736:	253,529:	122,467:	115,742:	230,000
Spain.....	39,691:	45,984:	40,832:	41,617:	30,000:	35,000:	40,000
Sweden.....	11,200:	8,032:	11,023:	6,614:	13,228:	12,125:	11,000
Switzerland.....	11,089:	20,855:	11,023:	30,864:	29,762:	31,967:	22,046
United Kingdom.....	95,166:	132,742:	85,792:	136,528:	162,176:	174,048:	175,000
Yugoslavia.....	598,567:	396,396:	451,841:	276,675:	316,468:	271,216:	300,000
Total.....	1,867,690:	1,658,910:	1,724,841:	1,896,562:	1,486,659:	1,607,999:	1,709,738
ASIA							
Lebanon.....	^{4/}	^{4/}	9,900:	9,900:	9,900:	9,900:	9,900
Palestine.....	550:	1,456:	2,615:	2,500:	2,500:	2,500:	2,500
Syria.....	^{5/} 1,298:	^{5/} 3,053:	1,756:	1,883:	1,757:	1,102:	1,800
Turkey.....	60,540:	48,609:	56,829:	60,715:	32,332:	62,263:	55,000
Japan.....	47,813:	57,804:	40,106:	40,705:	30,130:	40,000:	45,000
Total.....	110,201:	110,922:	111,206:	115,703:	76,619:	115,765:	114,200
SOUTH AMERICA							
Argentina.....	14,435:	24,987:	27,998:	26,113:	27,897:	28,000:	30,000
Chile.....	2,829:	7,694:	8,800:	12,600:	13,150:	13,500:	15,000
Total.....	17,264:	32,681:	36,798:	38,713:	41,047:	41,500:	45,000
AFRICA							
Tunisia.....	^{6/} 440:	1,036:	1,984:	1,650:	1,650:	1,500:	1,500
Union of South Africa.....	11,540:	8,750:	10,000:	12,000:	13,000:	10,000:	15,000
Total.....	11,980:	9,786:	11,984:	13,650:	14,650:	11,500:	16,500
OCEANIA							
Australia.....	21,312:	20,883:	21,358:	16,722:	21,645:	15,000:	18,000
New Zealand.....	2,036:	2,144:	2,415:	1,863:	2,919:	2,793:	3,000
Total.....	23,348:	23,027:	23,773:	18,585:	24,564:	17,793:	21,000
World total.....	2,839,214:	2,489,582:	2,709,814:	2,902,600:	2,341,014:	2,430,432:	2,695,838

^{1/} Preliminary. ^{2/} Does not include wild plums which are 85 percent of total production.

^{3/} Includes California dried prunes converted to a fresh basis at the ratio of 2 1/2 pounds of fresh fruit to 1 pound of dried. ^{4/} Included with Syria. ^{5/} Includes Lebanon. ^{6/} Less than 5 years.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information. Estimates of countries having boundary changes have been adjusted to postwar boundaries. Production is from bloom of year shown and includes plums and prunes produced for fresh consumption, drying and processing.

APRICOTS: Production in specified countries,
averages 1935-39 and 1940-44, annual 1945-49

Continent and country	Average						
	1935-39	1940-44	1945	1946	1947	1948	1949 1/
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
NORTH AMERICA							
Canada.....	1,255:	2,065:	2,175:	3,675:	2,900:	3,800:	4,300
Mexico.....	3,580:	4,508:	5,109:	5,512:	5,500:	5,500:	5,500
United States.....	265,170:	204,960:	191,500:	338,700:	201,500:	246,600:	217,900
Total.....	270,005:	211,533:	198,784:	347,887:	209,900:	255,900:	227,700
EUROPE							
Aegean Islands.....	265:	295:	300:	283:	198:	255:	250
Austria.....	3,973:	1,571:	4,971:	9,755:	6,848:	1,102:	5,000
Czechoslovakia.....	7,459:	3,295:	10,416:	15,817:	12,043:	8,325:	10,000
France.....	17,867:	24,812:	41,535:	24,021:	48,501:	21,780:	39,165
Germany.....	1,046:	138:	438:	666:	1,551:	1,314:	2,000
Hungary.....	26,560:	8,791:	27,558:	24,692:	19,620:	18,841:	51,808
Italy.....	27,594:	23,012:	24,216:	22,427:	15,045:	20,229:	21,274
Luxemburg.....	12:	51:	86:	50:	101:	27:	150
Rumania 2/.....	20,886:	17,325:	16,500:	16,535:	3,429:	1,100:	4,960
Spain.....	59,121:	71,692:	74,849:	77,666:	40,000:	60,000:	70,000
Switzerland.....	1,610:	3,461:	4,519:	7,937:	3,637:	3,858:	5,000
Yugoslavia.....	16,472:	15,790:	15,100:	12,321:	3,249:	2,772:	5,500
Total.....	182,865:	168,233:	220,488:	212,170:	154,222:	139,603:	215,107
ASIA							
Iran.....	85,775:	104,340:	44,092:	93,695:	55,115:	49,604:	60,000
Lebanon.....	3/	3/	3,307:	4,960:	5,512:	7,055:	5,000
Palestine.....	6,572:	5,868:	4,697:	7,046:	7,000:	7,000:	7,000
Syria.....	26,440 4/	23,129:	23,082:	23,519:	17,697:	38,580:	35,000
Turkey 5/.....	18,088:	18,069:	15,934:	15,878:	8,418:	9,307:	10,000
Total.....	136,875:	151,406:	91,112:	145,098:	93,742:	111,546:	117,000
SOUTH AMERICA							
Argentina.....	7,000:	10,130:	8,708:	8,653:	8,807:	8,800:	9,000
Chile.....	600:	507:	825:	740:	1,323:	1,433:	1,500
Total.....	7,600:	10,637:	9,533:	9,393:	10,130:	10,233:	10,500
AFRICA							
Tunisia.....	6/ 3,086:	4,519:	5,512:	6,614:	3,307:	5,000:	6,000
OCEANIA							
Australia.....	25,038:	27,101:	24,905:	27,875:	34,898:	25,000:	28,000
New Zealand.....	1,851:	1,539:	2,058:	1,464:	2,033:	2,709:	3,000
Total.....	26,889:	28,640:	26,963:	29,339:	36,931:	27,709:	31,000
World total.....	627,320:	574,968:	552,392:	750,501:	508,232:	549,991:	607,307

1/ Preliminary. 2/ Includes peaches. 3/ Included in Syria. 4/ Includes Lebanon. 5/ Does not include wild apricots. 6/ Less than 5 years.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information. Estimates of countries having boundary changes have been adjusted to postwar boundaries. Production is from bloom of year shown and includes apricots produced for fresh consumption, drying and processing.

WORLD APRICOT PRODUCTION UP 10 PERCENT

The 1949 world production of apricots is indicated to be 607,307 tons, 10 percent higher than the 1948 crop of 549,991, but 3 percent below the prewar average of 627,320. The United States, the world's largest producer, has a crop of 217,900 tons. The crop produced in California, Washington and Utah, is 12 percent below last year's crop of 246,600 tons, and 18 percent lower than the prewar average of 265,170 tons. Canada's crop, grown entirely in British Columbia, is estimated at 4,300 tons, compared with 3,800 for 1948 and the prewar average of 1,255.

Production in Europe, estimated at 215,107 tons compares with 139,603 for 1948 and 182,865 for the 1935-39 average. France, Hungary, Italy and Spain will account for 85 percent, or 182,247 tons, of the total European production this year. Production in France of 39,165 tons is 80 percent above last year's small crop of 21,780, but more than double the average production of 17,867 tons before the war. Hungary has a bumper crop of 51,808 tons, compared with 18,341 for 1948 and 26,560 prewar. Italy's crop of 21,274 tons is about 1,000 tons more than last season's crop but 23 percent below the prewar average of 27,594. Spain, Switzerland, and Yugoslavia each have indicated increased production this year.

Iran, the largest producer in the Asiatic area, has an indicated production of 60,000 tons, as compared with 49,604 for the previous crop. Indications are for some increase in South America, Tunisia and Oceania with 10,500, 6,000 and 31,000 tons respectively.

WORLD MEAT TRADE DECLINED IN 1948 1/

International trade in meat during 1948, excluding Asia and other unimportant meat producing areas, declined about 18 percent, dropping from nearly 4.8 billion pounds in 1947 to approximately 4.0 billion pounds in 1948, according to a recent estimate by the Office of Foreign Agricultural Relations. This is well below the 1946 level when nearly 5.6 billion pounds of meat moved in channels of international trade. The 1948 volume of trade was approximately 12 percent below that of the prewar period. Generally, the reduced volume of trade reflects the decrease in the world meat production in 1948 2/, the strong domestic demand for meat in producing countries and the limited exchange available in consuming countries for the purchase of imported meat.

1/ A more extensive statement, including graphic illustrations, may be obtained from the Office of Foreign Agricultural Relations. 2/ World meat production in 1948 was summarized in Foreign Crops and Markets, May 9, 1949 and World Hog Numbers, World Cattle Numbers and World Sheep Numbers were summarized in Foreign Crops and Markets, dated March 28, April 11, and April 25, 1949, respectively.

Meat exports in 1948 declined by about 843 million pounds when compared with those of 1947. The largest decrease occurred in exports from Argentina, United States, Denmark, Australia, New Zealand, Canada, Eire and Southern Rhodesia. The over-all decline, however, was offset to some extent by increased exports from Mexico, Uruguay, Brazil, Paraguay, Poland, Madagascar, the Soviet Union and a few other countries. In addition, such importing countries as Belgium and the Netherlands have increased their exports. During the year Poland became a net exporter of meat, after being a net importer in 1946 and 1947. In relation to prewar, Canada, New Zealand, Mexico, Madagascar and Paraguay were the only exporting countries from which exports in 1948 exceeded the 1934-38 average.

During the past few years, the trade status of some of the European countries changed somewhat from their prewar pattern. Such countries as Belgium, the Netherlands, Finland, and Sweden, for instance, were on a net importing basis in 1948 rather than on a net exporting basis. These countries, together with United States, Spain, Czechoslovakia, and Switzerland, increased their meat imports in 1948 by more than 512 million pounds in the aggregate compared with the prewar level. On the other hand, the 1948 imports into the United Kingdom were almost 930 million pounds below the 1934-38 average, and imports into Italy were about 30 million under the prewar average.

As a result of wartime losses in livestock numbers, the time required to rehabilitate the livestock industry in many European countries, and a growing population in many of those countries, the demand for meat imports has not only become greater in most importing countries, but also has increased in those countries which were formerly either self-sufficient or exported on a small scale. With the large decline in the world's exportable surplus in 1948, the United Kingdom, the largest importer of meat, had a smaller world supply to draw upon and at the same time obtained a smaller percentage (under 68 percent) of the total exports than the average received (83 percent) during the 1934-38 period. The other principal meat importing countries in 1948 were the United States with almost 350 million pounds, Belgium 201 million, Germany 166 million, and the Netherlands 74 million. Imports by other countries ranged from 6 million pounds for Portugal to 59 million pounds for Spain.

Canadian exports of meat in 1948 dropped off about 11 million pounds from a year earlier. Nevertheless, these exports were more than double those of prewar. Canada's removal of export controls on slaughter and feeder cattle and on sheep and lambs in August 1948, accounted for the reduction in meat exports from a year earlier. From August 16 to the end of 1948, according to Canadian sources, Canada exported to the United States 265,249 head of feeder and slaughter cattle, including calves. Apparently, the relatively high price for cattle in the United States during this period was an incentive for Canada to cancel its arrangement to supply the United Kingdom with beef and veal and instead to divert live cattle to the United States in exchange for a higher price and American dollars.

Continent and country	Average 1934-38		1946		1947		1948	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
	pounds	pounds	pounds	pounds	pounds	pounds	pounds	pounds
NORTH AMERICA								
Canada 3/.....	193,436	24,568	628,265	733	412,906	6,640	401,831	2,794
Mexico.....	23	1,130	6,246	1,683	15,358	813	92,827	438
United States 3/ 4/.....	114,600	262,000	129,300	20,900	283,200	64,500	68,400	349,700
Cuba.....	82	7,302	15	10,501	6	35,330	1	14,872
Total.....	308,100	295,000	1,763,800	33,800	711,500	107,300	562,700	367,800
EUROPE								
Austria.....	760	13,097	5/ 6/ 83,800		2,550 6/ 38,300		1,188	29,900
Belgium.....	54,501	6,790	20,195	348,032	3,918	225,486	22,560	201,297
Bulgaria 1/.....	4,715	-	13		5/	5/	5/ 6/	1,792
Czechoslovakia 1/.....	637	5,275	5/ 6/ 130,700		11 6/ 42,550		142,753	-
Denmark 8/.....	524,141	758	278,971	96	308,265	73	26,647	-
Eire.....	70,881	40	73,843	-	34,005	-	5/ 6/	346
Finland.....	6,435	1,257	-	8,631	17	4,607	5/	13,952
France.....	4,698	51,958	663	302,824	4,866	144,015	6,941	53,141
Germany 1/.....	4,148	156,081	-	6/ 44,100	-	6/ 31,100	-	6/ 165,700
Greece.....	-	2,689	-	6/ 68,700	-	6/ 18,750	-	6/ 32,681
Hungary.....	18,203	-	5/ 6/ 3,900		3,000	-	5/ 6/	346
Iceland.....	6,248	8	2,204	8	2,589	5/	1,206	5/
Italy.....	11,597	73,542	29 6/ 117,900		498	57,767	5,163	43,606
Netherlands.....	85,571	21,974	-	87,292	2,156	21,012	18,514	74,244
Norway.....	2,244	4,378	199	13,975	226	2,031	285	3,142
Poland 1/.....	113,490	62	5/ 6/ 149,400		5/ 6/ 92,650		25,000 6/	3,090
Portugal 9/.....	936	525	280	3,389	259	25,163	4,184	6,274
Rumania 1/.....	6,179	-	5/	5/	5/ 6/ 300		5/ 6/	1,394
Spain 10/.....	2,666	4,733	168	4,308	130	42,801	5/ 6/	58,650
Sweden 3/.....	31,097	14,914	440	23,745	221	25,367	2	18,244
Switzerland.....	1,350	8,515	48	15,753	74	35,834	2,159	36,345
United Kingdom 11/.....	28,008 3/ 4/ 5/ 910	2,376	3,553,715		1,901 3/ 519,308		1,764	2,527,008
Yugoslavia.....	18,901	-	-	6/ 83,300	5/ 6/ 15,800		5/ 6/	3,347
Total.....	1,007,400	3,822,500	379,500	5,041,600	365,300 4/ 343,900		259,100	3,330,000
U.S.S.R. 1/.....								
	8,295	6,213	-	6/ 231,700	5/ 6/ 24,700		5/	5/

SOUTH AMERICA

Argentina.....	1,460,045:	1,434,229:	1,995,747:	1,414,372:
Brazil.....	213,536:	2,563: 222,708:	6,430: 122,076:	354: 164,488:
Chile.....	20,977:	70: 26,387:	445: 16,995:	5/ 13,835:
Paraguay.....	16,483:	-: 61,300:	-: 12/30,100:	-: 40,000:
Uruguay.....	323,623:	44: 288,860:	-: 149,833:	-: 194,707:
Total.....	2,074,700:	2,700: 2,083,500:	6,900: 2,314,700:	400: 1,827,400:

AFRICA

Madagascar.....	30,410:	434: 24,200:	16: 41,773:	5/ 51,054:
Southern Rhodesia.....	18,601:	186: 17,259:	600: 16,122:	616: 6,048:
Union of South Africa.....	13,542:	19,643: 3,812:	25,996: 13/ 3,000: 6/	20,800: 13/ 2,000: 6/
Total.....	62,500:	20,300: 45,300:	26,600: 60,900:	21,400: 59,100:

OCEANIA

Australia.....	495,742:	7: 513,278:	-: 536,595:	-: 456,162:
New Zealand.....	594,138:	-: 794,033:	-: 805,585:	-: 778,524:
Total.....	1,089,900:	-: 1,307,300:	-: 1,342,200:	-: 1,234,700:

World total.....14,510,900: 4,146,700: 5,579,400: 5,340,600: 4,794,700: 4,496,700: 3,951,800: 3,722,200

1/ All meats converted to a carcass weight equivalent - includes beef and veal, pork, mutton and lamb, goat and horse meat; excludes live animals, edible offal, lard, rabbit and poultry meat. 2/ Preliminary.
 3/ Averages for years 1935-39. 4/ Excludes exports of horse meat, which averaged 2 million pounds in 1935-39, 4 million in 1946, 124 million in 1947 and 114 million in 1948. 5/ Not available. 6/ Based on exports from supplying countries reporting exports by destination. 7/ Present territory for postwar years. 8/ Includes carcass weight equivalent of live cattle exported. 9/ Averages for years 1934-37. 10/ Averages for years 1931-35. 11/ Includes edible offal. 12/ Based on imports into receiving countries reporting imports by origin. 13/ Estimate based on exports for 6 months.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States Foreign Service officers, and other available information, although in postwar years some international trade may have been excluded because of lack of information upon which to base estimates.

Meat exports from the United States since the war, and particularly after 1946 when UNRRA shipments ceased, have dropped drastically and the downward trend has continued. The 1948 exports of about 70 million pounds were less than one-fourth of those of 1947, and only 60 percent of prewar. This decline reflects the continuance of a relatively strong domestic demand for meat due to a high national income and a growing population. At the same time, the United States imported about 350 million pounds of meat, exclusive of the live cattle imported for slaughter from Canada, which partially offset the live cattle imports formerly received from Mexico.

Exports of meat from Mexico in 1948 were more than 6 times larger than those of 1947. Prewar live cattle exports to the United States formerly ranged from 400,000 to 500,000 head annually. With the outbreak of foot-and-mouth disease in December of 1946, this movement was discontinued. It, therefore, became necessary to provide a market outlet for the meat obtained from surplus cattle which normally would be exported. This required the establishment of several meat canning plants in surplus cattle producing areas of Mexico and, with the assistance of the United States, over 90 million pounds of canned meat were exported.

Denmark, Poland and Eire were the principal meat exporting countries in Europe in 1948. Danish meat exports of about 143 million pounds were less than half of those made in 1947, and slightly more than one-quarter as large as those of prewar. The 1948 exports were the lowest since 1942 when they reached 139 million pounds. Drought conditions in the latter part of 1947, shortage of imported feed in 1947 and 1948, and holding out of breeding stock in 1948, were the principal factors accounting for the drop in exports during 1948.

In Eire, reduced livestock numbers, live cattle exports, low export prices for canned meat, and limited feed supplies were the primary reasons for meat exports dropping from the prewar level of nearly 71 million pounds to 34 million pounds in 1947 and to about 27 million pounds in 1948. Some 281,000 head of live cattle, known as store cattle, were exported to the United Kingdom and Continental Europe in 1948.

On the basis of the limited data available, it is estimated that Poland exported about 25 million pounds of meat in 1948. This represents a shift from a net importer of meat in 1946 and 1947 to a net exporter. Polish meats, particularly bacon, and to a lesser degree, hams, are reentering world trade channels. Considerable beef has been imported from neighboring countries in order to enable Poland to export a larger volume of bacon and ham.

Argentine meat exports in 1948 were estimated at 1.4 billion pounds, one-half billion pounds below that of 1947 but only slightly under the prewar level. Exports declined primarily because of lower meat production during the year, continued strong domestic demand and relatively low export prices received. The drop in 1948 exports, according to estimates, exceeded the decline in meat production by about 127 million pounds.

Argentine exports made up 36 percent of the world meat exports in 1948, compared with 42 percent in 1947 and 32 percent in the 1934-38 period. Of these exports, about 51 percent was exported to the United Kingdom, compared with 74 percent in 1947 and 80 percent in the 1934-38 period.

Uruguay, the second largest exporter of meat in South America, increased its 1948 exports by more than 45 million pounds over the preceding year. Although these exports were 40 percent below the prewar level, the 1948 exports do reflect the increase in cattle numbers and meat production over the low levels following the 1942-43 drought. Brazil's exports also showed an increase over 1947, but were nearly 50 million pounds below the 1934-38 average. Increased domestic demand for meat in that country has been the major factor in holding down exports. Paraguay, likewise, increased its meat exports in 1948, more than double the prewar level. Meat exports from Chile, on the other hand, have shown a decline for several years due chiefly to lower livestock numbers and strong domestic demand.

Australian meat exports dropped from 537 million pounds in 1947 to 456 million pounds in 1948. This is almost 40 million dollars below the 1934-38 level. Relatively slow recovery from the long drought, extending over several years, and the holding back of breeding animals, apparently, were the predominating factors in last year's lower exports. New Zealand's meat exports showed a decline in 1948, compared with a year earlier, and were about 185 million pounds above the prewar level. Some holding out of breeding animals was a factor in last year's smaller exports.

Meat exports from Madagascar are estimated to be about 20 percent larger than 1947 and 70 percent above prewar. This is a continuing upward trend in exports, indicating an increase in domestic meat production.

Trade data are not available from the Soviet Union and from Asiatic and other unimportant meat producing countries and are, therefore, not covered in this summary. However, the quantities involved are believed to be relatively small and insignificant as far as total world trade is concerned.

U. S. FOREIGN TRADE IN AGRICULTURAL COMMODITIES
JUNE 1949

Exports of agricultural commodities during June 1949 were valued at \$330,778,000, compared with \$342,182,000 in May and \$242,286,000 in June 1948. Cotton exports of 531,000 bales, valued at \$88,824,000, were three times the June 1948 exports. June wheat exports of 30,313,000 bushels had a value of \$75,604,000. This compares with exports of 40,617,000 bushels valued at \$103,046,000 in May and 24,527,000 bushels valued at \$66,971,000 in June 1948. Exports of lard, amounting to 76,508,000 pounds, were five times as large as in 1948, and were valued at \$10,911,000. Cheese exports in June were twelve times as large as those in June last year and amounted to 31,251,000 pounds valued at \$11,036,000.

June imports of agricultural commodities were valued at \$235,084,000, compared with \$216,014,000 in May and \$267,663,000 in June 1948. Coffee, with 222,473,000 pounds valued at \$56,038,000, was the leading imported commodity. In May, 194,040,000 pounds were imported with a value of \$48,683,000. In June 1948, 276,590,000 pounds of coffee were brought into the United States with a value of \$67,358,000. About 386,000 short tons of sugar, valued at \$38,276,000 were imported, compared to 235,000 tons at \$22,115,000 in June 1948. Rubber, cocoa and wool were other leading imports.

Details by important commodities will appear in the forthcoming issue of the monthly publication, U. S. Foreign Trade in Agricultural Products. Preliminary totals for the July 1 - June 30 fiscal year will also be included.

(See tables on following pages)

UNITED STATES: Summary of exports, domestic, of selected
agricultural products during June, 1948 and 1949

Commodity exported	Unit	June			
		Quantity		Value	
		1948	1949	1948	1949
		Thou-	Thou-	1,000	1,000
		sands	sands	dollars	dollars
ANIMAL PRODUCTS:					
Butter.....	Lb.	476	295	437	196
Cheese.....	Lb.	2,579	31,251	1,176	11,036
Milk, condensed.....	Lb.	12,145	8,903	2,556	1,700
Milk, whole, dried.....	Lb.	9,572	5,873	5,162	3,136
Nonfat dry milk solids.....	Lb.	12,517	14,042	1,898	1,839
Milk, evaporated.....	Lb.	30,416	24,391	4,455	3,077
Eggs, dried.....	Lb.	1,054	363	413	364
Beef and veal, total 1/.....	Lb.	913	1,227	396	334
Pork, total 1/.....	Lb.	2,909	12,105	1,278	3,810
Horse meat.....	Lb.	9,487	3,000	1,716	495
Lard (incl. neutral).....	Lb.	13,725	76,508	3,461	10,911
Tallow, edible and inedible.....	Lb.	6,878	42,265	1,235	3,465
VEGETABLE PRODUCTS:					
Cotton, unmf'd, excl. linters (480 lb.)	Bale	139	531	26,300	88,824
Apples, fresh.....	Lb.	3,591	3,702	213	254
Grapefruit, fresh.....	Lb.	15,049	8,787	365	458
Oranges, fresh.....	Lb.	55,460	44,512	1,950	2,647
Pears, fresh.....	Lb.	73	72	9	10
Prunes, dried.....	Lb.	3,503	1,562	351	224
Raisins and currants.....	Lb.	60,483	4,950	4,181	476
Fruits, canned.....	Lb.	4,509	7,125	589	904
Fruit juices.....	Gal.	1,448	1,541	882	1,418
Barley, grain (48 lb.).....	Bu.	380	1,893	912	2,642
Barley malt (32 lb.).....	Bu.	432	217	1,424	572
Corn, grain (56 lb.).....	Bu.	371	4,581	883	7,234
Grain sorghums (56 lb.).....	Bu.	2/	5,436	1	7,830
Rice, milled, brown, etc.....	Lb.	19,161	57,893	2,114	5,207
Wheat, grain (60 lb.).....	Bu.	24,527	30,313	66,971	75,604
Flour, wholly of U.S. wheat (100 lb.)	Bag	7,911	2,316	56,101	11,056
Flour, other (100 lb.).....	Bag	30	412	232	2,415
Hops.....	Lb.	84	386	76	221
Peanuts, shelled.....	Lb.	12,431	37,445	2,236	4,735
Soybeans (except canned).....	Lb.	8,782	96,082	756	3,881
Soybean oil, crude and refined.....	Lb.	3,040	32,539	824	4,795
Soya flour.....	Lb.	93,312	341	5,873	23
Seeds, field and garden.....	Lb.	1,896	639	470	257
Tobacco leaf, bright flue-cured.....	Lb.	14,256	16,286	6,794	8,649
Tobacco leaf, other.....	Lb.	5,367	16,514	3,406	8,430
Beans, dried.....	Lb.	2,657	8,829	332	849
Peas, dried.....	Lb.	3,635	1,817	349	120
Potatoes, white.....	Lb.	28,094	25,410	739	722
Vegetables, canned.....	Lb.	4,804	7,684	643	1,287
Total above.....				210,159	282,107
Food exported for relief, etc.....				2,964	1,363
Other agricultural products.....				29,163	47,308
Total agricultural.....				242,286	330,778
Total all commodities.....				1,004,755	1,093,372

1/ Product weight. 2/ Less than 500. Compiled from official records of the Bureau of the Census.

UNITED STATES: Summary of imports for consumption
of selected agricultural products during June, 1948 and 1949

Commodity imported	Unit	June			
		Quantity		Value	
		1948	1949	1948	1949
		Thou- sands	Thou- sands	1,000 dollars	1,000 dollars
SUPPLEMENTARY					
ANIMALS AND ANIMAL PRODUCTS:					
Cattle, dutiable.....	No.	14	45	2,088	7,350
Cattle, free (for breeding).....	No.	6	2	1,350	474
Casein and lactarene.....	Lb.	4,371	2,134	998	303
Cheese.....	Lb.	2,106	2,794	1,074	1,491
Hides and skins.....	Lb.	19,982	11,620	8,398	5,939
Beef canned, incl. corned.....	Lb.	11,691	6,115	3,901	1,996
Wool, unmf'd., excl. free, etc.	Lb.	31,608	16,861	17,243	11,525
VEGETABLE PRODUCTS:					
Cotton, unmf'd., excl. lintors (480 lb.)	Bale	3	4	304	422
Jute and jute butts, unmf'd. (2240 lb.)	Ton	7	10	2,456	3,941
Apples, green or ripe (50 lb.).....	Bu.	1/	27	1/	109
Olives in brine.....	Gal.	907	555	1,502	1,231
Pineapples, prep. or preserved.....	Lb.	13,607	7,151	1,830	851
Barley malt.....	Lb.	2,324	9,106	184	449
Hops.....	Lb.	379	32	329	32
Almonds, shelled.....	Lb.	1,219	77	412	25
Brazil or cream nuts, not shelled....	Lb.	2,111	800	222	76
Cashew nuts.....	Lb.	2,640	3,014	1,018	1,181
Coconut meat, shredded, etc.	Lb.	11,505	10,402	2,924	1,682
Castor beans.....	Lb.	29,394	10,526	2,124	513
Copra.....	Lb.	81,982	81,879	11,828	6,174
Flaxseed (56 lb.).....	Bu.	105	1	550	4
Coconut oil.....	Lb.	6,528	8,442	1,408	1,118
Palm oil.....	Lb.	2,244	36,327	394	1,779
Tung oil.....	Lb.	7,416	921	1,643	152
Sugar, excl. beet (2,000 lb.).....	Ton	235	386	22,115	38,276
Molasses, unfit for human consumption	Gal.	35,923	15,177	7,150	966
Tobacco, cigarette leaf.....	Lb.	5,859	6,254	4,740	4,517
Tobacco, other leaf.....	Lb.	1,261	1,361	1,987	2,030
Potatoes, white.....	Lb.	94	12,742	3	294
Tomatoes, fresh.....	Lb.	50	374	2	27
COMPLEMENTARY					
Wool, mnf'd., free in bond.....	Lb.	42,699	13,017	11,764	4,080
VEGETABLE PRODUCTS:					
Bananas.....	Bunch	6,344	5,521	5,434	5,474
Coffee (ex. into Puerto Rico).....	Lb.	276,590	222,473	67,358	56,038
Cocoa or cacao beans and shells.....	Lb.	39,393	71,911	11,844	11,919
Tea.....	Lb.	8,499	8,412	4,205	4,883
Spices (complementary).....	Lb.	6,307	4,781	2,716	2,345
Sisal and henequen (2,240 lb.).....	Ton	7	14	2,300	4,525
Rubber, crude.....	Lb.	144,983	114,727	26,688	19,198
Total above.....				232,486	203,389
Other agricultural products.....				35,177	31,695
Total agricultural.....				267,663	235,084
Total all commodities.....				604,920	530,399

1/ Less than 500. Compiled from official records of the Bureau of the Census.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS AND FEEDS

U. S. RICE EXPORTS

SET NEW RECORD

United States rice exports during the August-June period of the 1948-49 marketing year were the largest on record. Export deliveries totaled 905 million pounds, 2 percent larger than the 888 million pounds exported in the corresponding period a year earlier. The principal areas of destination were Cuba, Indonesia, Philippines, China, Europe and Canada.

June consignments totaled 61 million pounds compared with 19 million in the same month last year. Sixty-one percent of the total went to Cuba, 20 percent to other Western Hemisphere countries, and 15 percent to Europe, mainly to Austria, Greece, Belgium and Luxemburg, and Switzerland.

RICE: United States exports to specified countries,
June 1949, with comparisons 1/

Continent and country	August-July		August-June		June	
	1937-38	1947-48	1947-48	1948-49	1948	1949
	to			2/		2/
	1941-42					
	Million	Million	Million	Million	Million	Million
	pounds	pounds	pounds	pounds	pounds	pounds
Switzerland.....	4	3/	3/	4	0	2
Austria.....	4/	9	9	22	3/	4
Greece.....	6	9	9	20	3/	2
Belgium and						
Luxemburg....	7	3/	3/	6	0	1
Other Europe....	26	4	3	4	3/	3/
Total Europe..	43	22	21	56	3/	9
Cuba.....	275	527	525	491	17	37
Canada.....	19	54	54	42	3/	3
Venezuela.....	2	1	3/	9	3/	6
Br. W. Indies...	3/	11	11	10	3/	3
Philippines....	3/	3/	3/	84	0	2
China.....	5/-	203	203	81	1	0
Indonesia.....	5/	1	1	89	0	0
Korea.....	5/	54	49	0	0	0
Other countries :	19	22	24	43	1	1
Total.....	358	895	888	905	19	61

1/ Milled rice, including brown, broken, screenings and brewers rice and rough rice converted to terms of milled at 65 percent. 2/ Preliminary.
3/ Less than 500,000 pounds. 4/ Not separately classified. 5/ If any, included in "Other Countries."

C O R R E C T I O N

The Argentine grain shipments table on page 139 of Foreign Crops and Markets, Vol. 59, No. 6, August 8, 1949, shows wheat exports to Chile during 1947-48 as 70,497 metric tons. It should read 74,497 metric tons.

TROPICAL PRODUCTSINDIA'S 1949-50 COFFEE
CROP SLIGHTLY LARGER

India's 1949-50 coffee crop has been forecast by the Indian Coffee Board at around 370,000 bags, compared with a revised 1948-49 crop estimate of about 365,000 bags, a 1947-48 crop of 268,000 bags, and an annual average of 278,000 bags for the 5-year period 1935-39, according to the American Consulate General in Madras. The 1949-50 crop is expected to consist of approximately 240,000 bags of Arabica and the remainder of Robusta.

Severe drought conditions which prevailed in the coffee growing areas of South India during the first few months of 1949 were followed by light showers in April and spasmodic heavy rains in May and June. The untimely rains and erratic weather conditions are expected to delay picking of the 1949-50 crop until the second half of September.

In view of the satisfactory crop position and the possibility of a surplus stock being available for export, the Marketing Committee of the Indian Coffee Board is reported to have confirmed an export allocation of 38,948 bags of coffee from the 1948-49 crop to the following destinations:

<u>Destinations</u>	<u>Bags</u>
United States of America	15,241
Switzerland	10,160
United Kingdom	8,467
Persian Gulf and Middle East	3,387
Yugoslavia	1,693
Total	38,948

Exports of coffee from India amounted to only 530 bags in 1948-49 (July 1 to June 30) compared with 37,900 bags in 1947-48, 79,300 bags in 1946-47 and the prewar average of 155,000 bags. Imports of coffee into India are prohibited by law.

COSTA RICA EXPECTS RECORD
1949-50 COFFEE HARVEST

A record 1949-50 coffee crop of 475,000 bags is forecast for Costa Rica, according to the American Embassy in San Jose. Weather conditions have been very favorable, and, unless the maturing crop should be damaged by extremely heavy rains in September, the 1949-50 harvest will be the largest in Costa Rica's history, exceeding the previous record of 466,000 bags in 1937-38. In 1948-49, Costa Rica produced 302,000 bags of coffee, the smallest harvest since 1924-25 with the exception of the 1945-46 production of 268,000 bags. The bumper 1947-48 coffee crop amounted to 462,000 bags, substantially higher than the prewar, 1935-39, average production of 390,000 bags.

Costa Rica allocated 10 percent (about 30,000 bags) of the 1948-49 coffee crop for domestic consumption leaving around 272,000 bags to be exported. Approximately 262,000 bags of this export quota had already been sold by June 30, 1949. The amount of coffee reserved from each crop for consumption within the country is established annually for each crop year by the Coffee Bureau after consideration of the size of the crop, demand during previous years, and the condition of the export market. If the domestic consumption quota is set again at 10 percent, the 1949-50 crop should provide around 425,000 bags of coffee for export.

CENTRALIZING BUREAU FOR COFFEE CREDITS
ESTABLISHED IN COSTA RICA

The National Bank of Costa Rica announced recently that a Centralizing Bureau for Coffee Credits has been established, according to the American Embassy in San Jose. It will operate as a new division of the National Bank and will have attached to it an Advisory Committee made up of 2 representatives from each of the 4 commercial banks affiliated with the National Banking System and 2 representatives from the Coffee Bureau. Its objectives will be:

1. To study all the credit aspects of the coffee industry.
2. To compile all possible information regarding the economic activities of the coffee processors, making such information available to the commercial banks so that these may be free to offer as much credit assistance to the coffee industry as is possible, with the greatest margin of safety.
3. To exercise control over the sales of coffee given as security for loans from the banks and to see that the sales are applied to the loans in order to have the obligations paid in full at the end of each crop year.

Local banking institutions state that there is hardly one coffee processor in Costa Rica who does not require annual credit facilities for financing his activities. For that reason, the proper coordination of the activities of the local banks in connection with the granting of credit to the coffee industry is of vital importance to the industry and to the country at large, since coffee is the financial mainstay of Costa Rica.

TOBACCOIRELAND GRANTS DUTY PREFERENCE
ON BRITISH COMMONWEALTH TOBACCO

Effective July 12, 1949, the Irish Government granted a duty preference of 31 cents per pound on unmanufactured tobacco consigned from and grown in the British Commonwealth, according to the American Legation in Dublin. In addition, excise duties on home grown leaf have been reduced 31 cents a pound and on Cavendish or Negrohead manufactured in bond the excise duty has been reduced 86 cents a pound.

The preferential rate of customs duty is £ 1-2-3½ (\$4.48) per pound, as compared with the full duty rate of £ 1-3-10 (\$4.79) per pound on unstemmed leaf containing 10 percent or more moisture. On stemmed leaf containing 10 percent or more moisture the preferential rate is £ 1-2-4- (\$4.49) a pound. This compares with the full duty rate of £ 1-3-10½ (\$4.80) a pound.

The new excise duty on tobacco grown in Ireland is £ 1-1-2½ (\$4.26) a pound on leaf containing 10 percent or more moisture, as compared with the previous rate of £ 1-2-9 (\$4.57). On Cavendish or Negrohead manufactured in bond the new duty is £ 1-5-2½ (\$5.07) a pound. The previous rate on this product was £ 1-9-6 (\$5.93).

The duty preference on British Commonwealth tobacco was granted by the Irish Government as an inducement to domestic manufacturers to purchase larger quantities of leaf from non-dollar areas in order to conserve dollar exchange. In his budget speech last May, the Irish Minister for Industry and Commerce stated that the principal non-dollar source of leaf would be Rhodesia but that the price of Virginia leaf in that country was about 1 shilling 6½ pence (31 U.S. cents per pound) higher than in the United States. As an inducement to manufacturers to purchase Rhodesian leaf, he proposed to adjust the differential in price by granting a preferential rate on tobacco grown in the British Commonwealth. He also stated that the granting of a preferential rate would involve a corresponding reduction in the excise duty chargeable on tobacco grown in Ireland.

Ireland has traditionally imported from the United States practically all of the tobacco it has consumed. In the prewar years, 1935-39, when leaf used in the manufacture of products averaged about 11 million pounds annually, 97 percent of the supply came from the United States. Domestic grown leaf accounted for about 2 percent and imports from all sources other than the United States, less than 1 percent. In the post-war years, 1946, 1947, and 1948, when consumption was somewhat above the prewar level, domestic grown leaf accounted for less than 1 percent of total consumption and imports from all sources other than the United States accounted for less than 3 percent.

The duty preference on tobacco from British Commonwealth sources and the corresponding reduction in the excise duty on home grown tobacco will tend to encourage increased use of British Commonwealth and home grown leaf in place of United States leaf. It is believed that the 31 cents per pound preference will more than offset price differentials between United States leaf and tobacco from certain British Commonwealth sources. The 31 cents per pound reduction in the excise duty on tobacco grown in Ireland will tend to increase prices to growers, thereby encouraging increased domestic production.

NEW ZEALAND 1948-49 TOBACCO CROP LOSSES
HEAVY; INSURANCE CLAIMS LARGEST ON RECORD

During the 1948-49 season, New Zealand tobacco growers experienced unusually heavy crop losses, according to the American Embassy in Wellington. Claims for compensation from the New Zealand Tobacco Growers' Insurance Fund are the largest since the insurance program was inaugurated during the 1944-45 crop season.

Due to heavy 1948-49 crop losses, caused by frost and hail, it is estimated that compensation will be paid on 500,000 to 600,000 pounds of leaf this year from the New Zealand Tobacco Growers' Insurance Fund. This compares with 50,244 pounds for which compensation was paid in 1948, 300 pounds in 1947, 16,249 pounds in 1946 and 62,178 pounds in 1945. The compensation paid growers amounted to £ 1,092 - 16 - 11 (\$4,338.16) in 1948, £ 5-0-0 (\$19.85) in 1947, £ 340 - 2 - 7 (\$1,350.18) in 1946, and £ 1,251 - 6 - 5 (\$4,967.62) in 1945.

The New Zealand Tobacco Growers' Insurance program is administered by the Tobacco Board, a Government-grower-industry constituted organization. The program provides for compensation to contract growers of tobacco for total destruction caused by hail, frost or flood. For expenses of the Board, including insurance, there is a levy on leaf sold by licensed growers for manufacture into cigarettes and other tobacco products. The rate of levy is determined each year by the Tobacco Board. From 1944-45 to date the levy has remained unchanged at 1/4 pence (0.4 cents) per pound.

A contract grower who considers that he has suffered a compensatable loss must notify the manufacturer, with whom he has a contract, of such loss and request that the crop be inspected. Inspectors determine the cause and amount of the loss and report their findings to the Tobacco Board. Immediately following inspection the contract grower delivers in writing to the Board his claim for compensation. At the close of the season the Board reviews all claims received by it and the report of inspections thereon and determines the assessments required to cover the losses. The exact amount of the 1948-49 crop losses and the steps that will be taken to meet these losses has not yet been determined.

COTTON AND OTHER FIBERCOTTON-PRICE QUOTATIONS
ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets converted at current rates of exchange.

COTTON: Spot prices in certain foreign markets, and the
U.S. gulf-port averages

Market location, kind, and quality	Date 1949	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
<u>Alexandria</u>		: Kantar	: Tallari	:	:
Ashmouni, Good.....	8-11	: 99.05 lbs.	: "	: 46.15	: 38.49
Ashmouni, F.G.F.	"	: "	: "	: 44.65	: 37.24
Karnak, Good.....	"	: "	: "	: 77.80	: 64.88
Karnak, F.G.F.	"	: "	: "	:	: (not:quoted)
<u>Bombay</u>		: Candy	:	:	:
Jarila, Fine.....	"	: 784 lbs.	: Rupee	: 620.00	: 23.86
Broach, Fine.....	"	: "	: "	: 650.00	: 25.01
<u>Kurachi</u>		: Maund	:	:	:
4F Punjab, S.G., Fine.....		: 82.28 lbs.	: "	:	:
289F Sind, S.G., Fine.....		: "	: "	:	:
289F Punjab, S.G., Fine....		: "	: "	:	:
<u>Buenos Aires</u>		: Metric ton	:	:	:
Type B.....	8-11	: 2204.6 lbs.	: Peso	: 1/4000.00	: 54.03
<u>Lima</u>		: Sp. quintal:	:	:	:
Tenguis, Type 5.....	8-10	: 101.4 lbs.	: Sol	:	: (not:quoted)
Pima, Type 1.....	"	: "	: "	:	: (not:quoted)
<u>Recife</u>		: Arroba	:	:	:
Mata, Type 4.....	8-11	: 33.07 lbs.	: Cruzeiro	: 205.00	: 33.73
Sertao, Type 5.....	"	: "	: "	: 190.00	: 31.26
<u>Sao Paulo</u>		:	:	:	:
Sao Paulo, Type 5.....	"	: "	: "	: 195.00	: 32.08
<u>Torreón</u>		: Sp. quintal:	:	:	:
Middling, 15/16".....	"	: 101.4 lbs.	: Peso	: 194.00	: 22.13
<u>Houston-Galveston-New</u>		:	:	:	:
Orleans av. Md. 15/16"	"	: Pound	: Cent	: XXXXX	: 31.07

Quotations of foreign markets reported by cable from U. S. Foreign Service posts abroad. U. S. quotations from designated spot markets.

1/ Nominal.

TEXTILE INDUSTRY IN IRELAND

Ireland now has 8 cotton mills in operation, according to Francis H. Whitaker, Agricultural Economist, who is surveying the cotton requirements of the textile industries in European countries. Only one of these mills, however, is equipped to do any cotton spinning. This mill, located in Athlone, Ireland, started operations in January 1948 with 11,936 spindles and 281 automatic looms. As it can more than supply its own needs of cotton yarns, it sells considerable quantities of yarn to other mills. The total number of looms in all Ireland has been reported at 2,300, which, however, are interchangeable for cotton, linen, or rayon yarns.

During the period (1938-40), Ireland imported 7 to 12 million pounds of yarn per year. This is equivalent to 16,000 to 28,000 bales of raw cotton. Imports of yarn in the postwar period have averaged about 4 million pounds or the equivalent of about 9,500 bales of cotton. Imports of raw cotton have been reported at 1,375 bales in 1947, 4,000 bales in 1948, and an estimate of 3,000 bales in 1949.

Ireland normally imports most of its yarn requirements from the United Kingdom. During the war, however, supplies of yarn were limited in the United Kingdom, and Ireland secured yarn from other sources, principally the United States and Brazil. Very little has been imported from Brazil, however, since 1946. Although the United States has retained a share in this yarn market, Ireland is now procuring most of its yarn imports from the United Kingdom.

EXPORT PROGRAMS STIMULATE U.S. COTTON SHIPMENTS

Exports of cotton from the United States during June 1949 amounted to 531,000 bales of 500 pounds gross (508,000 running bales), making a total of 4,725,000 bales for the 11 months ended June 30, 1949. This is more than double the 11-month total of 1,870,000 bales for 1947-48 and will be nearly equal to the prewar average when the figures for July are added.

The heavy export movement this year is attributed mainly to the export program of the Economic Cooperation Administration and those for the areas under allied military occupation. The cotton shipped under these programs represented about three-fourths of the total in 1948-49.

Exports to countries in the Western Hemisphere and eastern Europe increased from 247,000 bales in this 11-month period of 1947-48 to 657,000 bales in the corresponding months of 1948-49. This sharp increase of 166 percent in exports to countries paying cash for all cotton received during the past season is attributed to the fact that American-type cotton available from countries other than the United States was scarce while supplies in the United States were more than adequate to meet all demands. This resulted in low prices for United States cotton in relation to similar types abroad.

UNITED STATES: Exports of cotton by countries of destination; average
1934-38, annual 1945-47, Aug.-June 1947-48 and 1948-49

(Bales of 500 pounds gross)

Country	Year beginning August 1				Aug. - June	
	Average 1934-38	1945	1946	1947	1947-48	1948-49
	<u>bales</u>	<u>bales</u>	<u>bales</u>	<u>bales</u>	<u>bales</u>	<u>bales</u>
Austria.....	0	0	4	3	1/	68
Belgium.....						
Luxemburg.....	147	75	182	53	51	144
Czechoslovakia..	65	70	101	22	22	32
Denmark.....	35	0	0	3	0	29
Finland.....	35	17	23	27	27	32
France.....	589	793	393	216	202	655
Germany.....	579	6	200	232	228	470
Greece.....	2	31	10	1	1	10
Italy.....	430	515	460	70	62	639
Netherlands.....	86	48	116	35	35	191
Norway.....	13	1	5	3	3	16
Poland & Danzig..	224	104	49	50	50	84
Spain.....	101	161	42	3	2	68
Sweden.....	93	2	23	6	6	1/
Switzerland.....	2	27	20	3	2	38
United Kingdom..	1,097	296	486	272	267	755
Yugoslavia.....	10	94	61	0	0	40
Other Europe....	2/ 85	4	0	1	3	3/ 63
Total Europe..	3,593	2,244	2,175	1,000	961	3,334
Canada.....	261	321	320	138	134	290
Chile.....	4/	0	0	1/	1/	38
Colombia.....	17	0	1	1	1	46
Cuba.....	7	6	34	13	13	6
India.....	44	1/	0	21	9	3
China.....	55	719	569	303	218	275
Japan.....	1,271	365	511	466	451	525
Fr. Indo-China..	4/	3	6	4	4	8
Korea.....	4/	0	0	59	59	33
Australia.....	5	13	9	11	11	0
Other countries..	45	7	17	9	9	5/ 77
Total.....	5,296	3,678	3,642	2,025	1,870	4,725

1/ Less than 500 bales. 2/ Includes 39 Portugal, 23 Soviet Union.
3/ Includes 23 Soviet Union, 14 Rumania, 6 Bulgaria, 6 Hungary. 4/ If any,
included in other countries. 5/ Includes 29 Hong Kong.

Compiled from official records of the Bureau of the Census.

The supply of cotton in the United States for the 1949-50 season will be larger than that of a year ago because of an increase of more than 2 million bales in the season-end stocks and a 1949 crop about equal to that of a year ago. Some increase in production of American-type cotton abroad, especially in Brazil, Mexico, British African colonies and possibly Pakistan, this year will be partly offset by reductions in stocks since a year ago.

In 1949-50 the countries of western Europe, Japan, and Korea will continue to receive cotton under the ECA and other export programs sponsored by the United States Government. Exports to other countries should remain near the 1948-49 level because of continued scarcity and relatively high prices of American-type cotton abroad. The two principal factors that may retard the export movement this year are the growing scarcity of dollar exchange in importing countries and declining mill consumption in some countries where business recessions have already resulted in heavy accumulation of surplus cotton cloth stocks.

FATS AND OILS

U. S. EXPORTS OF SPECIFIED FATS, OILS, AND OILSEEDS

The following table shows United States exports of specified fats, oils, and oilseeds during January-June 1949 with comparisons:

UNITED STATES: Exports of specified fats, oils, and oilseeds,
January-June 1949 with comparisons

Commodity	Unit	Average 1935-39	1947	1948 1/	January-June 1948 1/ : 1949 1/	
Soybeans	:1,000 bu.	:2/ 4,793:	2,505 :	6,497 :	2,246 :	14,199
Soybean oil	:	:	:	:	:	:
Refined.....	:1,000 lbs.	:3/ (6,467:	38,883 :	41,266 :	25,896 :	117,715
Crude.....	: " "	: " "	68,395 :	41,769 :	31,059 :	91,366
Coconut oil	:	:	:	:	:	:
Refined.....	: " "	: 3,789:	5,491 :	9,273 :	6,949 :	2,136
Crude.....	: " "	: 10,442:	52,427 :	9,820 :	7,058 :	5,958
Cottonseed oil	:	:	:	:	:	:
Refined.....	: " "	: 4,793:	10,977 :	22,672 :	19,840 :	48,894
Crude.....	: " "	: 1,515:	901 :	10,094 :	3,094 :	23,858
Flaxseed.....	:1,000 bu.	:3/ :	16 :	1,650 :	15 :	3,039
Linseed oil.....	:1,000 lbs.	:1,280:	9,855 :	29,636 :	18,434 :	2,778
Peanuts	:	:	:	:	:	:
Shelled.....	: " "	:3/ (452:	212,253 :	458,655 :	236,224 :	247,745
Unshelled.....	: " "	: " "	18,681 :	10,594 :	4,341 :	4,251
Peanut oil, refined	: " "	:2/ 325:	1,579 :	685 :	641 :	17,752
Cooking fats.....	: " "	: 2,111:	3,594 :	3,522 :	1,618 :	3,510
Lard.....	: " "	: 165,636:	380,735 :	271,835 :	147,015 :	364,035
Oleomargarine.....	:	: 180:	19,954 :	3,408 :	2,500 :	1,140
Tallow	:	:	:	:	:	:
Edible.....	:	:	601 :	1,377 :	1,195 :	17,044
Inedible.....	:3/ (1,651:	:	54,553 :	67,995 :	19,966 :	194,680

1/ Preliminary. 2/ Average of less than 5 years. 3/ Not separately classified in Foreign Commerce and Navigation. 4/ Revised. 5/ 1939 only.

Compiled from official sources.

SWISS TARIFFS RAISED ON EDIBLE FATS, OILS, AND RELATED MATERIALS

Imports of edible fats and oils into Switzerland again will be free of centralized import activity beginning October 1, 1949, according to the American Legation at Bern. The Association of Importers of Edible Oils and Fats will be dissolved September 31, 1949. This agency, in agreement with the Swiss Government, has acted since 1941 as the sole centralized importer of edible fats and oils, semi-finished products and raw materials for the production of such edible products.

The Federal Council decreed on July 15, 1949, that subsequent to that date a "price supplement"--in effect, an increased tariff--would be collected on all imported edible fats and oils, and products used in their manufacture. In addition to increasing State revenue, the higher tariff will protect Swiss fat and oil manufacturers and force Swiss farmers to rely less on foods from imported raw materials. The new "tariff" schedule, compared with former rates, is as follows:

<u>Product</u>	<u>Price supplement in U. S. dollars</u> <u>per short ton</u>	
	<u>Previous</u>	<u>New</u>
Olive oil	\$ 2.12	\$ 10.60
Other edible oils	2.12	10.60
Edible fats	2.12	10.60
Peanuts (manufacture of edible fats and oils)	2.12	4.24
Copra (for manufacture of edible fats and oils)	2.12	6.36

The Swiss Grain and Feed Cooperative Society and the Export-Import Section of the Federal Department of Public Economy are responsible for collecting the price supplement on the imported products that are cleared through customs.

LIVESTOCK AND ANIMAL PRODUCTSCOSTA RICA LOWERS IMPORT DUTY
ON SOME POWDERED MILKS

Costa Rican import tariff item 140 was changed on July 20, 1949, to include one United States and one Canadian brand of powdered milk. This will allow these brands a preferred duty of 0.03 colones per gross kilo (.23 cents per pound). The regular duty for this commodity is 0.706 - 0.766 colones per kilo (5.6 - 6.1 cents per pound) depending on the content. The preferred shipments must be packed in units not exceeding one kilo and approved by the Ministry of Public Health for infant feeding.

DANISH-CZECHOSLOVAKIAN
TRADE AGREEMENT CONFIRMED

Reports confirm Danish-Czechoslovakian trade agreement signed July 30, 1949 which provides for the exchange of goods valued at 2.2 million kroner (.5 million dollars). Denmark will supply dried eggs in return for manufactured goods.

URUGUAYAN TURKEY CROP
AVAILABLE FOR EXPORT

It is reported that Uruguayan turkey producers have begun marketing this year's crop and that approximately 100,000 birds will be available for export. Market prices opened at 0.80 pesos per kilogram (18.1 cents per pound) which is about the same as last year. The European market, particularly England, has been the traditional outlet for Uruguayan turkeys and it is expected to continue so this year even though no sales contracts have been reported as yet.

The Uruguayan turkeys, predominately Broad Breasted Bronze breeding, are raised mainly in small family flocks under open range conditions. Thus, they are produced at a very low cost. However, Uruguay finds it difficult to increase its turkey output because the season is not the same as that in the northern markets, and because the Uruguayan industry has not been able to adjust production economically to the turkey marketing seasons in those markets.

FRANCE-DANISH
AGREEMENT REVISED

The French-Danish commercial agreement of October 30, 1948 was revised to permit additional quotas of some commodities which included 5,000 metric tons of butter and condensed milk valued at 3.6 million Danish Kroner. These supplementary quotas are valid until October 31, 1949. (One U. S. dollar equals 4.81 kroner).

